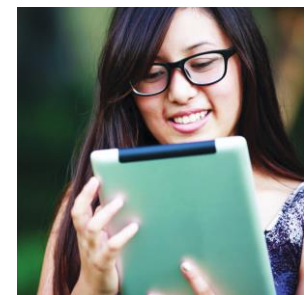




# How-to Guide:

Organize your Member Roster



Sponsors can organize their Member Rosters using Quicklists and District and/or School information.

Quicklists make it easier for Sponsors on large accounts to manage the members they support. Quicklist members will also appear at the top of the list of Members from whom to choose during the download process, making it easier to find the right member(s). Each Sponsor can set up and manage his/her own Quicklist.

Adding District and School information for each student enables Sponsors to filter the member roster to see a list of members for a particular district or school. The roster can also be filtered by grade level.

## Adding Members to / Removing Members from Quicklists

1) On the "My Bookshare" page, select the "Members" link.

### My Bookshare


- My History
- My Reading Lists
- Members**
- Sponsors
- Upload Roster
- Organization Info
- My Requests
- Download Reading Tools
- My Account


## Welcome Tanya Teacher


### Recent News

[Bookshare Benetech Veteran Educator Gives Students the Tools to Succeed at Reading and Life](#)

[Dyslexia Doesn't Slow Ryan Down](#)

 **Read Our Books in Braille**

 **Get Answers in the Help Center**

 **Help Students Access Books**

2) Select "Add Member."

### Manage Members





#### Members


Members are students or clients that have a qualifying print disability.


**Filter by:** **Members** All Members **District** All Districts **School** All Schools **Filter**

**Sort:** By First Name  **Q**

4 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	<a href="#">Organization</a>	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	<a href="#">Organization</a>	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	<a href="#">Organization</a>	Physical	IEP
<input type="checkbox"/>		Susi	Smith	SusieSmith123	—	5	-	05/05/2002	<a href="#">Organization</a>	Visual	504

 **Add Member**

 Add to Reading List

More Actions ▼

- 3) Complete member information. The Quicklist box will automatically be checked. To change, simply uncheck the box.

### Add New Member

**Account Details**  
This account information will allow your member to access books.

First Name*	<input type="text" value="Jane"/>	Username	<input type="text" value="Jdoe"/>
Last Name*	<input type="text" value="Doe"/>	Password	<input type="text" value="Test12345"/>
Birth Date* (MM/DD/YYYY)	<input type="text" value="05/12/1996"/>	<b>Quicklist</b>	<input checked="" type="checkbox"/> ?
Current Grade*	<input type="text" value="Select one"/>	District	<input type="text" value="--"/>
		School	<input type="text" value="--"/>

**Qualifying Information**  
This form serves as proof of disability in place of sending signed documentation.

<b>Disability*</b>	<b>Plans</b>
<input type="checkbox"/> Visual	<input type="checkbox"/> User has an IEP
<input type="checkbox"/> Learning	<input type="checkbox"/> User is 504 Qualified
<input type="checkbox"/> Physical	

**Reading Preferences** ▼

- 4) To add existing members to your Quicklist, place a check mark next to their names and select the "Add to Quicklist" link under the "More Actions" button.

## Manage Members

My Bookshare

- My History
- My Reading Lists
- Members
- Sponsors
- Upload Roster
- Organization Info
- My Requests
- Download Reading Tools
- My Account

### Members

Members are students or clients that have a qualifying print disability.

Filter by: **Members** All Members District All Districts School All Schools

Sort: By First Name Search Members

4 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input checked="" type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	Organization	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	Organization	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	Organization	Physical	IEP
<input type="checkbox"/>		Susi	Smith	SusieSmith123	—	5	-	05/05/2002	Organization	Visual	504

Add Individual Membership

Increment Grade Level

Add to Quicklist

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- 5) To see only the members on your Quicklist, select "My Quicklist" in the dropdown menu next to "Filter by" and select the "filter" button.

## Manage Members

My Bookshare

- My History
- My Reading Lists
- Members
- Sponsors
- Upload Roster
- Organization Info
- My Requests
- Download Reading Tools
- My Account

### Members

Members are students or clients that have a qualifying print disability.

Filter by: **Members** **My QuickList** District All Districts School All Schools **Filter**

Sort: By First Name Search Members Q

3 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	Organization	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	Organization	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	Organization	Physical	IEP

Add Member Add to Reading List More Actions ▼

- 6) To remove members from your Quicklist, place a check mark next to their name and select "Remove from Quicklist" under the "More Actions" button.

### Members

Members are students or clients that have a qualifying print disability.

Filter by: **Members** **My QuickList** District All Districts School All Schools **Filter**

Sort: By First Name Search Members Q

3 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input checked="" type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	Organization	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	Organization	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	Organization	Physical	IEP

Add Member Add to Reading List More Actions ▼

- Add Individual Membership
- Increment Grade Level
- Remove from Quicklist**

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## Adding District and School Information

- 7) Enter the district and school information when you add a new member and select "Save."

### Add New Member

**Account Details**

This account information will allow your member to access books.

First Name*	<input type="text" value="Jane"/>	Username	<input type="text" value="JDoe"/>
Last Name*	<input type="text" value="Doe"/>	Password	<input type="text" value="Test12345"/>
Birth Date* (MM/DD/YYYY)	<input type="text" value="5/12/1996"/>	Quicklist	<input checked="" type="checkbox"/>
Current Grade*	<input type="text" value="Select one"/>	District	<input type="text" value="—"/>
		School	<input type="text" value="—"/>

**Qualifying Information**

This form serves as proof of disability in place of sending signed documentation.

<b>Disability*</b> <ul style="list-style-type: none"><li><input type="checkbox"/> Visual</li><li><input type="checkbox"/> Learning</li><li><input type="checkbox"/> Physical</li></ul>	<b>Plans</b> <ul style="list-style-type: none"><li><input type="checkbox"/> User has an IEP</li><li><input type="checkbox"/> User is 504 Qualified</li></ul>
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**Reading Preferences** ▼

- 8) To add district and school information to existing members, select the edit icon next to a member's name, Enter the name of District and/or School and select the save button.





## Members

Members are students or clients that have a qualifying print disability.

**Filter by:** **Members**  **District**  **School**

**Sort:**

4 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input checked="" type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	Organization	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	Organization	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	Organization	Physical	IEP
<input type="checkbox"/>		Susi	Smith	SusieSmith123	—	5	-	05/05/2002	Organization	Visual	504

## Edit Member

**Account Details**  
This account information will allow your member to access books.

First Name*	<input type="text" value="Jane"/>	Username	<input type="text" value="janedoe12345"/>
Last Name*	<input type="text" value="Doe"/>	Password	***** <a href="#">Reset</a>
Birth Date* (MM/DD/YYYY)	<input type="text" value="01/08/2005"/>	Quicklist	<input checked="" type="checkbox"/>
Current Grade*	<input type="text" value="8"/>	District	<input type="text" value=""/>
		School	<input type="text" value=""/>

**Qualifying Information**  
This form serves as proof of disability in place of sending signed documentation.

<b>Disability*</b>	<b>Plans</b>
<input type="checkbox"/> Visual	<input type="checkbox"/> User has an IEP
<input checked="" type="checkbox"/> Learning	<input type="checkbox"/> User is 504 Qualified
<input type="checkbox"/> Physical	

**Reading Preferences** ▼

Note: you can also enter District and School information on the group upload roster. For more information about group uploads see the [How to Guide: How to Add Members and Sponsors on an Organizational Account](#).

- 9) To filter by District or School, choose the appropriate district or school name from the drop down menu and select the "Filter" button.

## Members

Members are students or clients that have a qualifying print disability.

**Filter by:** **Members**  **District**  **School**

**Sort:**

4 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input type="checkbox"/>		Jane	Doe	janedoe12345	—	8	Yes	01/08/2005	Organization	Learning	
<input type="checkbox"/>		John	Doe		Demo District Demo High School	9	Yes	11/19/1989	Organization	Visual	
<input type="checkbox"/>		June	Doe	JuneDoe1	District N P101X	5	Yes	07/17/2002	Organization	Physical	IEP
<input type="checkbox"/>		Susi	Smith	SusieSmith123	—	5	-	05/05/2002	Organization	Visual	504

## Removing Members from Organizational Account

- 10) Primary Contacts can remove groups of members from an organizational account all at once by placing check marks in the boxes next to the members' names, then selecting "Remove Member".

**Members**

Members are students or clients that have a qualifying print disability.

**Filter by:** **Members** All Members **District** All Districts **School** All Schools **Filter**

**Sort:** By First Name Search Members

5 results

<input type="checkbox"/>	Edit	First Name	Last Name	Username	District + School	Grade	Quicklist	Birth Date	Membership	Qualifying Disability	Plan
<input checked="" type="checkbox"/>		Bookshare	Ben	BookshareBen	Smith School Smith School	9	Yes	03/10/2007	Organization	Physical	
<input checked="" type="checkbox"/>		Jane	Doe	JaneDoe12345678	—	6	Yes	06/30/1997	Organization	Learning	
<input checked="" type="checkbox"/>		Bill	Smith		—	10	Yes	04/23/2011	Organization	Physical	
<input type="checkbox"/>		Jane	Smith	(private)	—	7	Yes	05/02/2004	Org + Individual	Visual	
<input type="checkbox"/>		Sharon	Smith	sharonsmith123	—	6	Yes	05/05/2015	Organization	Visual	

Add Member Add to Reading List **More Actions**

- Add Individual Membership
- Increment Grade Level
- Add to Quicklist
- Remove Member**

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- 11) Sponsors can remove members from the account one at a time by selecting the edit icon next to the appropriate name in the member roster, then selecting the "Remove member" button.

**Edit Member**

**Account Details**  
This account information will allow your member to access books.

First Name\* Jane Username JaneDoe12345678  
Last Name\* Doe Password \*\*\*\*\* [Reset](#)  
Birth Date\* (MM/DD/YYYY) 06/30/1997 Quicklist ☒ ?  
Current Grade\* 6 District — School —

**Qualifying Information**  
This form serves as proof of disability in place of sending signed documentation.

**Disability\*** **Plans**  
☐ Visual ☐ User has an IEP  
☒ Learning ☐ User is 504 Qualified  
☐ Physical

**Reading Preferences** ▼

[Save](#) [Save & Add Individual Membership](#) ? [Cancel](#) **Remove Member**